

Staff Expense Reimbursement

Expense reimbursement for staff traveling on approved district business will be governed by the following procedures. Travel expenses include travel fares, meals and lodging and expenses incident to travel. Only travel expenses as are ordinary and necessary in the conduct of approved travel for district business purposes and directly attributable to it will be reimbursed. As used in this regulation an “ordinary” expense means one that is common and accepted in the profession; a “necessary” expense means one that is essential and appropriate in order to conduct district business.

In-District Travel - Use of Private Vehicles

1. Staff will use district-owned vehicles, whenever possible, in conducting district business that requires travel within district boundaries.
2. Private vehicles may be used in conducting district business only with prior principal approval. In-district travel approval may be granted by the principal for individual trips or by blanket approval, as deemed appropriate.
3. Travel in a private vehicle for the purpose of conducting district business may be approved when:
 - a. A district vehicle is not available;
 - b. The destination is not conveniently accessible by commercial carrier;
 - c. Various points must be visited and commercial carrier schedules are such that the use of commercial carrier transportation is not practical;
 - d. Carrying articles by commercial carrier would not be feasible;
 - e. Commercial travel is deemed to be less economical.

Out-of-District Travel (In-state) – Use of Private Vehicles

1. Staff will use district-owned vehicles, whenever possible, in conducting approved district business that requires in-state travel outside district boundaries.
2. Private vehicles may be used only with prior site administrator approval. Out-of-district travel approval may be granted by the site administrator for individual trips or by blanket approval, as deemed appropriate.

Out-of-State Travel

Out-of-state travel requires prior superintendent approval.

Insurance Coverage

1. Insurance costs are included as part of the mileage reimbursement for employees authorized to use a private vehicle to conduct district business. It is the responsibility of the owner or driver of the vehicle to be certain that the vehicle is adequately covered by insurance.
2. The responsibility of the district for damages resulting from vehicle accidents is not the same as set forth in the district's general liability insurance policy. The employee's insurance coverage provides primary coverage when the employee is driving his/her own vehicle on approved district business.

Meals and Meetings

1. Reimbursement will be made for ordinary and necessary meal expenses incurred in the course of approved travel for district business. Meals include amounts spent for food, beverage, taxes and related gratuities not to exceed 15 percent. Alcoholic beverages will not be reimbursed by the district. See Expense Reimbursement Request and Accounting Procedures below and limitations per applicable employee collective bargaining agreements.
2. Expenses in excess of the district's established limit are ordinarily the responsibility of the employee and may be reimbursed only with superintendent approval. Original itemized receipts for all meal expenses must be secured and attached to the claim.

Reservations, Commercial Carrier and Lodging

1. Travel and lodging must be conducted in the most expeditious and cost-effective manner, as determined by the district.
2. The district prohibits the accrual of travel credits for individuals traveling on approved district business.

Vehicle Rentals

Rental vehicles may be used only when use will affect a savings or otherwise be more advantageous to the district or when the use of other transportation is not feasible. All vehicle rentals must be arranged through the district business office. Any additional costs incurred for other usage will be the personal responsibility of the traveler.

Cancelled Trips

1. If an employee cannot leave at the scheduled time, it is his/her responsibility to call the travel agency or carrier and arrange to have the tickets cancelled or exchanged.
2. Commercial carrier reservation cancellations must be made at least 24 hours before departure time, whenever possible.
3. Lodging reservations must be cancelled by the employee as soon as possible to avoid a cancellation charge.

Personal Travel Combined with District Business Travel

1. If an individual traveling on approved district business engages in both business and personal activities, travel expenses incurred will be reimbursed only for expenses that are ordinary and necessary in the conduct of district business. Expenses incurred as a part of personal business are the sole responsibility of the traveler.
2. When personal travel is combined with approved district business travel and the individual is not traveling by the most expeditious and cost-effective manner, any additional costs must be paid by the traveler.
3. Time away from work caused by not traveling by the most expeditious means available for personal purposes must be charged to vacation or other appropriate leave.
4. Vacation or other personal leave may be taken in conjunction with approved district travel subject to the following:
 - a. Time delays related to approved district business are charged as working time even if no work is performed;
 - b. If the employee does not travel by the most cost-effective manner, as determined by the district, for approved district business or for personal travel combined with travel for district business purposes, he/she must pay the additional cost (e.g., increased fare, meals, lodging expenses, etc.) incurred as a result of the personal travel;
 - c. All subsistence and local transportation (e.g., taxi, vehicle fare, etc.) while on vacation status or other appropriate leave must be paid by the employee;
 - d. The traveler will not be required to pay any of the basic transportation costs incurred as a part of the approved district business, even though he/she spends a substantial part of the total time away from home on vacation or other personal leave, provided the employee was traveling on approved district business;
 - e. A traveler who decides on his/her own to conduct district business without prior approval, while on vacation or other personal leave, cannot then use this as a justification to have the district pay his/her basic transportation cost from the district to the location visited or submit a request for other expense reimbursement.

Expense Reimbursement Request and Accounting Procedures

1. Reimbursement requests detailing actual expenditures must be submitted on the district's travel expense form and approved by the principal/supervisor in writing. Original itemized receipts and supporting documentation must accompany all expense reimbursement requests. This includes, but is not limited to, receipts for transportation, lodging, meals, registration, conference and workshop fees. All requests must be submitted to the district office within 10 working days of the conclusion of the trip.
2. Expenses which consist primarily of the cost of furnishing meals for others will be reimbursed only if they are incurred while conducting district business. A travel expense report must be submitted which includes:

- a. Names of guests;
 - b. Organizations involved;
 - c. Full explanation of the district business purpose of the meeting.
3. In the event a vehicle was rented, a copy of the rental agreement must be attached to the travel expense report.
 4. Any claim for mileage reimbursement only may be submitted at the end of each month in which reimbursement is to be claimed. A claim must be submitted no later than the employee's last working day of the school year. Reimbursement claims later than that will be denied.
 5. Mileage for approved district business travel in a private vehicle will be reimbursed at the current rate per mile established by the district, collective bargaining agreement or Internal Revenue Service (IRS), as applicable.

Reimbursable Expense Limitations

1. Meal and lodging expenses may be reimbursed subject to the limitations in current collective bargaining agreements.
2. Gratuities must not exceed 15 percent and must be included as a part of the receipt. Gratuities in excess of 15 percent are the responsibility of the employee and will not be reimbursed by the district.
3. Other expenses, such as toll charges or parking fees, may be reimbursed if length of trip or circumstances demand.
4. Lodging will be reimbursed at rates per applicable employee collective bargaining agreements. Reimbursements will not include charges for personal telephone calls, in-room movie rentals or other personal expenses not related to district business.

Employee Leave Request

Name _____

Position _____

Building _____

Date Submitted _____

Type of Request

- Personal Leave
- Vacation/Non-Duty
- Leave W/O Pay
- Association/Union
- Military Duty (attach verification)
- Bereavement (relationship) _____
- Classroom Extension (field trip or other activity that extends the classroom)
- Staff Development – select type:
 - Conference
 - Workshop
 - School visitation
 - Class observation
- Program Development – select type:
 - curriculum work
 - committee work
- Athletic Leave – select type:
 - clinic
 - coaching
 - other _____
- Other (Specify) _____

Justification for Request _____

Complete Applicable Sections

Dates Absent from Duty _____

Conference _____

Location _____

Substitute Required Yes No

Days Absent - Year to Date _____

Future Absences Anticipated _____

Funding Requested

Transportation \$ _____

District Car

Private Car

(attach a copy of personal insurance information)

Lodging and Meals \$ _____

(Submit receipts attached to CO-40 upon return.

Refer to applicable employee bargained agreement for limits.)

Registration \$ _____

(Please attach registration form to CO-40 and send it to district office in advance.)

Other \$ _____

Total \$ _____

Disposition of Request

Approved Denied

Principal/Supervisor's Signature

Date

Instructions

Submit form to Principal/Supervisor for signature.
Send one copy to: District Office, Principal, Employee